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Made in Colombia

1. Access to the system

Navigation in Idempiere is one of the great benefits that it offers since its interface is very friendly, it allows configuration in multiple languages and when placing the mouse pointer on each of its icons or buttons, it clearly shows the name and/or role it plays. To enter the system you may use any browser (Chrome, Firefox, Explorer ...) by entering the URL provided. For optimum performance navigating the system with Google Chrome.

1.1. Login to the system

To enter the Idempiere solution simply enter the URL assigned in any internet browser, there you must enter User and Password provided by the administrator of the Idempiere system. Then select the desired system language from the drop down options.



In the following security window the system will validate the following information:



**When you click on Select Role, the system will perform a validation of:*

Client: Highest Company structure level

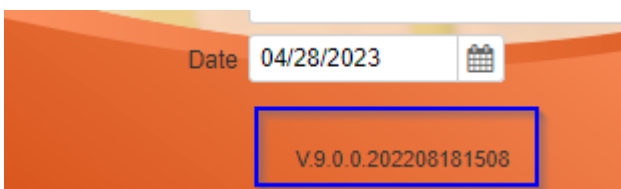
Role: Whether administrator or user, with this registry the system corroborates the accesses and permissions given.

Organization: You can enter the selected organization with the help of the filter, otherwise this field will be assigned at level * to enter a macro level that includes all organizations.

Warehouse: Select the specific Warehouse or Main Warehouse to which you want to enter.

Date of entry: Date to register and generate the transactions.

At the bottom of the image, information about the version of the software is found and the operating system data on which the databases are running. This data will be necessary at the time of making a technical consultation of the program.



2. System Authentication - Roles And Users

2.1. User

Users will have access to the system and inherit at a general level the permissions assigned to the Roles. A user can belong to several Roles.

2.2. Role

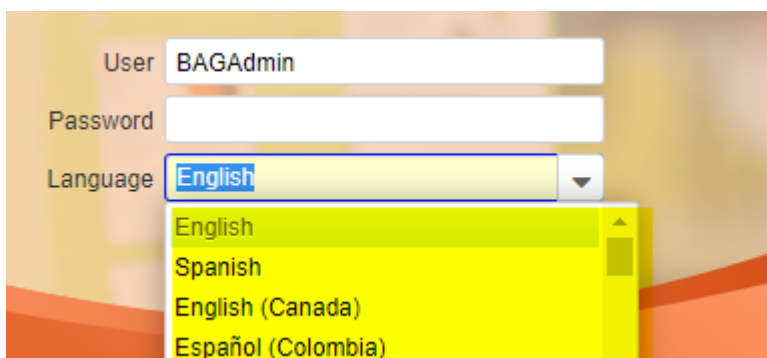
Corresponds to the different permissions that can be assigned to a group of users.

Example: Access in the menu, actions in windows, action in documents, application of accounting, among others.

3. Multi Language

ERP supports different types of languages. Simply select it in the access control so that the system changes the entire interface to this language.

**The number of languages available depends on the system administrator client configuration.*



4. Client And Organizations

In Idempiere the client is the highest level of an independent business entity.

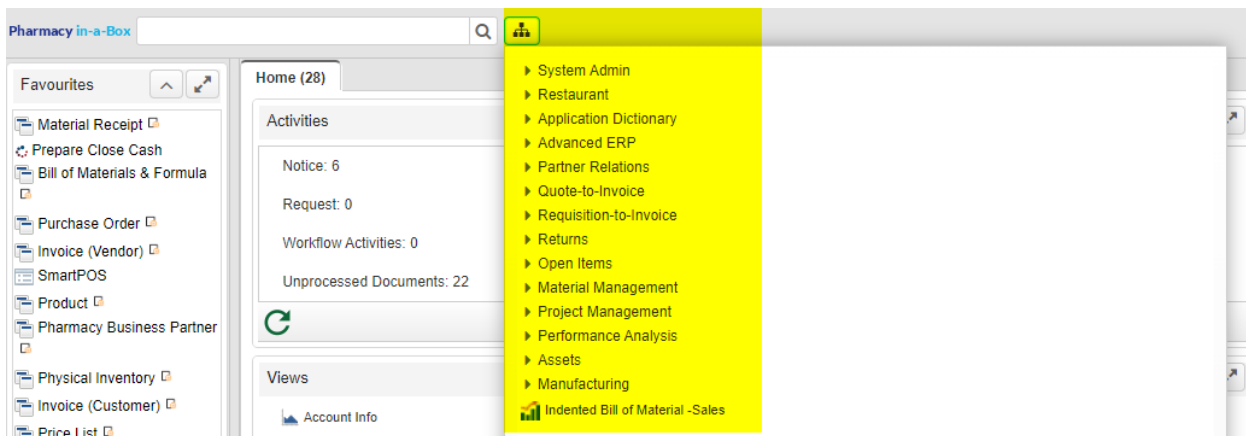
Each Client will have one or more organizations depending on their need.

Each client defines the accounting parameters (accounting schema, tree definition, among others).

An organization is an entity under which transactions are recorded on a daily basis

5. Menu

In Idempiere, navigating the menu is very simple since it was created as an explorer and has a tree structure.

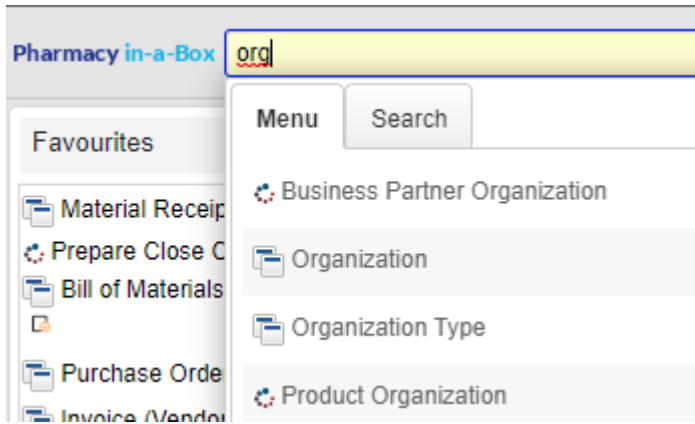


To view all options and submenus , you must mark the expand tree option.

Expand Tree 

Click on it again to shrink the menu to the basic structure.

The system provides a search engine which allows you to filter the options that are part of the name typed for easy access.



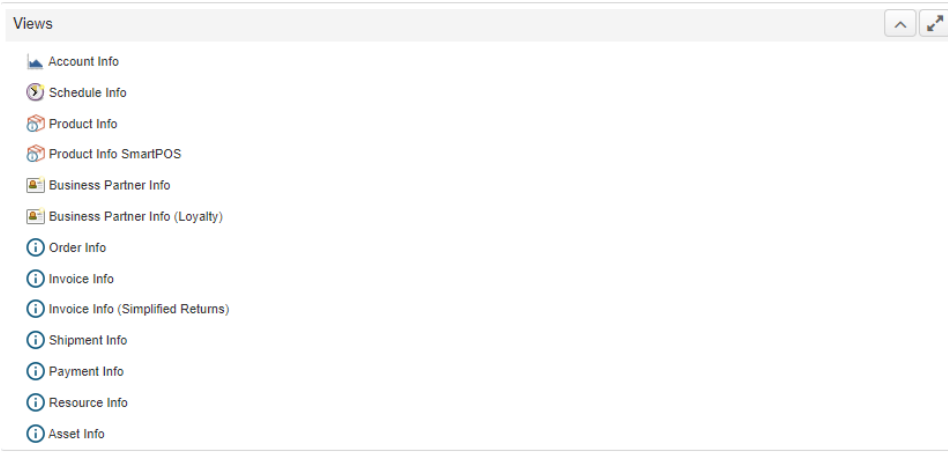
6. Work Area

When entering the system you will find the scheduled activities, favorites and some special reports.

Activities: Here you can quickly observe and enter processes or workflows. Some of them are: notice, request, workflows and raw documents.



Views: Here you can see the direct links to the most frequent info windows, among them Business Partner and others.

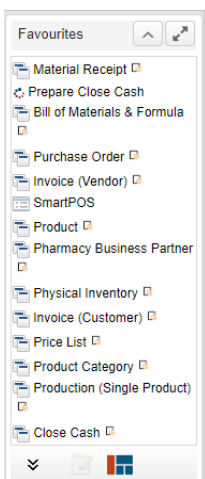


Performance: In this view you can see financial, budgetary or custom management indicators (KPI). This will depend on the needs of the company.



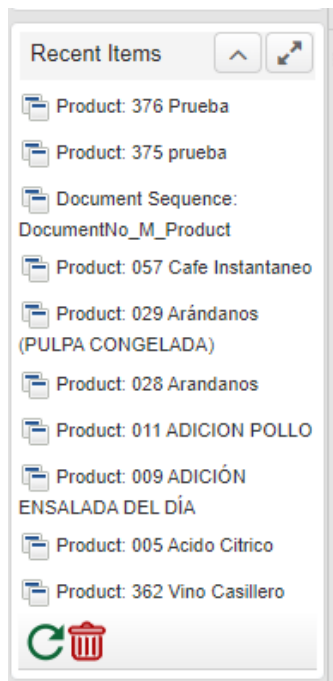
Favorites: In this view you can add processes and / or documents to which you can access more frequently, gaining time and accessing more quickly. You can also remove them using the delete icon.

You can define new favorites just by dragging & dropping the items (using your mouse) from the menu to this area.



Recent Records: In this view you can see the processes or documents made by the logged-in user. In the same way they can be deleted with the delete icon.

The information in Idempiere is stored and registered through windows, these are used to store for example: Business Partner information, products, general accounting and other data of high importance for the company.



Next, the Business Partner window will be used as an example to explain the concept.

6.1. Window - Levels and Layout

In each of these windows there are fields, which help to define specific topics according to the window where they are located. Some are mandatory and others are not, depending on the initial configuration.

.2. Detailed records - Tabs

In most of the ERP windows you will find an additional TAB called "Detailed Record" in which additional information is stored linked to the main window.

7. Main Icons and Functions

Warning: Please notice these icons could be different depending on your default or custom theme(that including different welcome screen, icons and coloring), but the function is the same



Lookup Record



New Record



Copy Record (from current one)



Save Record



Delete Record



Undo action



Requery / Refresh



Grid toggle



Attachment



Zoom across (cross references associated records/documents)



Process (advanced actions if available)



Print



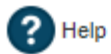
Back to parent record



Navigate to detail record



More options:



Help



Chat



Save and Create New



Post-it



Archived Documents/Reports



Active Workflows



Check Requests



Product Info



Export



Customize

Quick Form



Import File Loader



CSV Import File Loader

Index: <http://www.smartjsp.com/web/en/idempiereFirstSteps>